Appendix XI
Sample of Meeting Strategies

1) PAL, CACNOC 9/92

2) Meetings and Group Dynamics, Community
    Advisory Committee Guidelines

P A L

Every meeting should have a PURPOSE, AGENDA, and LIMITS.

PURPOSE: Be clear why the meeting is being held and what is to be accomplished. Never have a meeting for which you have not prepared and which does not have a reason. NEVER HAVE A MEETING JUST TO HAVE A MEETING.

AGENDA: Always have an agenda set out in as much detail as necessary to keep you and your team on track. Make sure minutes are kept to reflect what happened.

LIMIT: Set a date and place for all meetings but above all set a time (for example one hour). Start on time and begin ending the meeting at least 5 minutes before time limit is up. Starting and ending on time is a golden rule of meetings.

If you remember and apply these three simple rules, you will be practicing the simplest but most difficult leadership behaviors.

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ITEMS TO POST AT MEETINGS

GROUP NORMS:

All groups must have some basic group rules. Some may
include:

* Be on time

* No side conversations

* Have an agenda with time limits

* Have a facilitator (each member can take turns to
   facilitate the group)

* Post agenda, Group Norms, Parking Lot, Action Items

* Closure on all items

* Consensus when appropriate

AGENDA:

Agenda's are sent out in a timely manner. Items on the agenda
may include:

* Name of Group

* Title of meeting

* Name & Phone number of person who called meeting

* Date, starting time, place and ending time

* Background materials

* Order of agenda items, persons responsible, process
  and time allocated

PARKING LOT:

We have all been to meetings where the same subject comes up
over and over. Or a person wants to talk about something that
isn't on the agenda. The Parking Lot is a wonderful tool to
acknowledge that person.

The Parking Lot is a large sheet of paper that you can use to write items that are not on the agenda, or items that you cannot come to consensus on. Once you have written the item on the Parking Lot you have acknowledged that it is important and if there is time, you will go to the Parking Lot and discuss the items there. If there is no time during the meeting you will have a list for future agenda's. If the subject is brought up again - you can point out to the person that you have included it in the Parking Lot and do they have any other information to add or are they "revisiting that item"?

ACTION ITEMS/ ACTION PLANS

Action items and Action Plans give your group a goal/target for the year. These items can include:

* Trainings

* Fund raising

* Community Education

When you list your action items and action plans you need to include timelines for its completion.

<u>SUMMARY:</u>

Effective team leaders should be able to communicate answers to these basic questions:

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                        What is our goal?     How do we get there?
                           PURPOSE               AGENDA

                                               What is expected of us?
                Why are we doing this?              ROLES
                    BENEFITS

                    What happens if        Who helps us?
                    things go wrong?          SUPPORT
                      PROBLEM
                      SOLVING
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CONSENSUS

The word "consensus" implies the voluntary giving of consent. When decisions are to be made, consensus is one method and voting is another. The principles behind voting and consensus are very different. Both methods of making a decision can be useful, but the differences should be understood.

In voting, the majority wins, while the remainder lose. Thus, voting is a win/lose system. It works well when the voters know that they'll get another chance after a time, as they do when there is a set of rules that protect the rights of the minority. However, the group that loses can feel very threatened under certain circumstances.

Thus, voting has the potential for creating divisiveness and conflict.

On the other hand, voting is clear-cut in its results and can be done within a limited time period. When a decision is required, it can be the most efficient way of arriving at that decision. Furthermore when a large number of people are involved and want some voice, voting is perhaps the only workable system.

Consensus requires that all the decision-makers discuss the issue until everyone can agree on a solution. By the work "agree" we do not mean that everyone shares an equal degree of enthusiasm. It simply means that everyone is at least willing in good conscience to go along with the decision and help carry it out. That is, nobody has such serious reservations as to want to stop the decision.

Consensus is a win/win method. It guarantees that nobody will lose because it requires that the decision not be made until everyone can "live" with it. It is an extremely useful technique for making sure that everyone feels ownership of the action which is finally taken. This is why it is so valuable as a team-building tool.

Consensus helps us achieve quality performance by developing common goals and directions. It enhances both the quality of a decision and its acceptance by all involved.

BRAINSTORMING

WHAT IS BRAINSTORMING?

Brainstorming is a way of using a group of people to quickly generate, clarify and evaluate a sizable list of ideas, problems, issues, etc.

The emphasis is on quantity of ideas, not quality.

It can be an excellent technique for tapping the creative thinking of a team.

WHEN DO WE USE IT?

We use it as a data gathering technique to:

- collect improvement opportunities and/or problem areas

- suggest possible solutions

- identify barriers or aids

WHY DO WE USE IT?

Brainstorming helps to document "what we know" as a team. It stimulates team creativity and gets everyone involved.

HOW DO WE BRAINSTORM?

During the Generation Phase of brainstorming, the leader reviews the rules for brainstorming with the team members.

The rules are as follows:

- Each person may take a turn in sequence, passing is permissible

OR

- ideas may be expressed spontaneously

- ideas are neither criticized nor discussed

- build on ideas of others

- ideas are recorded where they're visible to the group

During the Clarification Phase of brainstorming, the team
goes over the list to make sure that everyone understands all
items. Discussion will take place later.

Finally, during the Evaluation Phase, the team reviews the
list to eliminate duplications, irrelevancies or issues that
are off limits.

These three phases are like the gears on a car. You can only
be in one gear at a time without injuring the mechanism.

MULTIVOTING

WHAT IS MULTIVOTING?

Multivoting is a structured series of votes used by a team to help them reduce a list containing a large number of items to a manageable few (usually three to five).

WHEN DO WE USE IT?

Multivoting (a subjective prioritizing technique) may be used throughout the process after a team discusses the various items on a brainstorm list which is too lengthy to be addressed at once.

WHY DO WE USE IT?

Multivoting helps to accomplish "list reduction" quickly and with a high degree of group agreement.

HOW DO WE MULITVOTE?

1. 1st vote - each person votes for as many items as desired, but only once per item. Circle the items receiving a relatively higher number of votes than the other items. (Example: A team has 10 members. Items receiving 5 or more votes are circled).

2. Count the circled items. 2nd vote - each person gets to vote a number of times equal to one-half the circled items. (Example continued: If 6 items received 5 or more votes, than each person gets to vote 3 times during the 2nd vote).

3. Continue multivoting until the list is reduced to three to five items, which can then be further analyzed. NEVER MULTIVOTE DOWN TO ONLY ONE (1) ITEM !!

TARGETS AND GOALS

WHAT ARE TARGETS AND GOALS?

A goal is a desired state or standard tracked by an indicator.A

A target is a milestone towards the accomplishment of that

desired goal.

WHEN DO WE USE THEM?

Once a performance indicator is identified, targets may be set.

WHY DO WE USE THEM?

Targets are set to give the team, as well as others, a milestone against which to measure the effectiveness of performance; to see if solutions are successful in addressing the problem and therefore, moving the indictor closer to the target.

HOW DO WE SET THEM?

Targets should be set to be challenging but achievable during a reasonable amount of time, normally not more than a year. They should be based on logic not just pulled out of the air. An ultimate goal may be needed but interim targets can be set as milestones towards its accomplishment.

- In setting targets, first consider needs and expectations. This may also help to restructure an indicator. If the needs and expectations are not immediately achievable, they should be kept as an ultimate goal. Set an interim target which is challenging but achievable.

- Your own past performance can be used to set a target. If at one time your performance was significantly better, you may want to set that as a target and look for what has changed.

available aids and/or to overcome the barriers which can prevent implementation of a solution.

HOW DO WE USE "BARRIERS AND AIDS"?

1 - Identify the probable solution, task, change or concern

2 - Identify (through brainstorming) possible barriers; put them in a list

3 - Identify likely aids (again list them)

4 - Rank all listed items as high, medium or low

5 - Match aids which balance or overcome barriers

6 - List matching Barriers and Aids on a chart

7 - List non-matching Barriers and Aids and brainstorm any offsetting factors

(Note: it is not necessary to come up with an aid for every barrier)

8 - Identify items needing team action using your rankings (H, M & L)

9 - Develop an action plan

Problem Behaviors and Possible Treatments

The following treatments are provided so that you may effectively conduct the exercise on PG 3.11 and 3.12. The treatments below are suggested only; there will be others so you may want to expand your list each time you facilitate TLT.

Behavior #1: Passive listener

Possible Treatments

- pose direct questions to him/her
- assign specific jobs or assignments
- delegate responsibility to him/her (e.g., let him/her refresh group on Pareto diagram)

Behavior #2: Devil's advocate

Possible Treatments

- ask member to justify arguments and objections
- do not allow criticism of ideas or actions without an accompanying alternative
- make member feel like a part of the group by assigning present actions, etc.

Behavior #3: Defensive; ready to "fire"

Possible Treatments

- go out of your way to make member feel comfortable
- encourage group to be accepting of all ideas and points of view

Behavior #4: Wise owl; know-it-all

Possible Treatments

- assign research on new tool/technique
- delegate authority as appropriate
- openly discuss behavior on an
  individual basis (explain effect on
  group)

Behavior #5: Disinterested, detached

Possible treatments

- assign person to be recorder
- ask direct questions
- pair him/her with more active member
  on some task

Behavior #6: Meditator; out of touch

Possible treatments

- encourage member to express the ideas
  he/she is pondering
- assign person as recorder
- involve person in a coordinating
  function (e.g., data collection)

Behavior #7: Never says anything

Possible treatments

- pose direct questions you know he/she
  is capable of answering (in case fear
  keeps him/her quiet)
- ask person for opinions (be sure to
  always encourage group acceptance)

Behavior #8: Hostile and angry

Possible treatments

- allow other group members to express
  reactions to him/her (often other
  group members can easily affect
  behaviors - do not allow violence to
  erupt)
- have private conversation with him/her
- involve member contructively

Behavior #9: Constantly volunteering and
              contributing (assume
              contribution is not always
              appropriate or valuable.)

Possible treatments

- divide tasks to be accomplished
  equally among team members
- assign member to be team recorder
- recognize and reinforce valuable
  contributions to group activity

Behavior #10: Bored (outwardly)

Possible treatments

- ask person for opinions, contributions
- acknowledge those who behave in a
  positive manner
- determine an area of interest to
  him/her and assign a related task

Behavior #11: Clown; always joking

Possible treatments

- Ignore clowning behavior so that group
  will be encouraged to do the same
- direct serious, group-related
  questions toward him/her
- if necessary, have an individual
  discussion about the behavior and its
  effect on the group

Behavior #12: Member misses meetings often

Possible treatments

- discuss the reasons for the absences
  with the team member. Some scenarios
  are listed below.

If the reason is...	then...
-management will not provide time to attend	-discuss situation with management; you may need to replace that member.
-member does not feel he/she has the knowledge to contribute to the group (assume this is true)...	-consider sending member to training to bolster confidence.
-member does not feel he/she has the knowledge to contribute to the group (assume this is _not_ true)...	-encourage member to attend; assign task you're sure he/she can do well.

If the reason is...	then...
-member has personality conflict with another member	-assure him/her you will do what you can to minimize problems and foster good relations. Perhaps a group social function planned by the two members who don't get along is called for.
-member is not comfortable with the way you you lead the group	-discuss reservations and consider suggestions. If criticisms are valid plan for changes and encourage member to attend (you must keep an open mind!). If criticisms are not valid you could discuss them and if necessary, suggest member move to another QIT.

Situations will need to be dealt with on an individual basis. Good judgement is your best guide.

GROUP DYNAMICS

Changes in team leadership or the creation of new teams often results in a less efficient group due to the tendency of all groups to go through some predictable stages of growth and regression. An awareness of the stages of group development is important particularly for Team Leaders.

TUCKMAN'S MODEL OF GROUP DEVELOPMENT

Tuckman (1965) summarized the results of over fifty studies into the following four-stage model.

>   Stage I   -   Form, characterized by testing &
>   dependence
>
>   Stage II - Storm, characterized by intrateam conflict
>
>   Stage III - Norm, characterized by the development of
>   team cohesion
>
>   Stage IV - Perform, characterized by acceptance of
>   roles and purposeful activity

STAGE I: FORM

During Stage I, team members discover what behaviors are acceptable to the group. For newly established groups, this stage is the transition from individual to member status. For teams with new leadership, mission and/or members, this stage is a period of testing behavior and dependence on formal or informal group leadership for guidance in a new unstructured environment.

This stage is characterized by:

>   * Attempts to identify tasks in terms of relevant
>   parameters and to decide how the group will
>   accomplish the tasks
>
>   * Decisions on the type of information needed and how
>   it will be used

* Hesitant participation

* Tests of behavioral expectations and ways to handle
  behavioral problems

* Feelings of initial attachment to the team

* Intellectualizing

* Discussion of symptoms or problems peripheral to the
  task

* Complaints about the organizational environment

* Suspicion, fear and anxiety about the new situation

* Minimal work accomplished

STAGE II: STORM

During Stage II, team members become hostile or overzealous as
a way to express their individuality and resist group
formation. Members recognize the extent of the task demand
and respond emotionally to the perceived requirements for
self-change and self-denial. Other characteristics of this
stage may include:

* Infighting, defensiveness and competition

* Establishment of unachievable goals

* Disunity, increased tension and jealousy

* Resistance to the task demands because they perceived
  to interfere with personal needs

* Polarization of group members

* Sharp fluctuation of relationships and reversal of
  feelings

* Concern over excessive work

* Establishment of pecking orders

* Minimal work accomplished

STAGE III: NORM

During Stage III, members accept the team, team norms, their own roles and idiosyncracies of fellow members, Emotional conflict is reduced by resolving previously conflicting relationships. Other characteristics of this stage include:

* An attempt to achieve maximum harmony by avoiding conflict

* A high level of intimacy characterized by confiding in each other, sharing personal problems and
discussing team dynamics

* A new ability to express emotions constructively

* A sense of team cohesiveness with common spirit and goals

* Moderate work accomplishment

STAGE IV: PERFORM

Now that the team has established its interpersonal norms, it becomes an entity capable of diagnosing and solving problems and making decisions. It works as a unit. Teams do not always reach Stage IV. Other characteristics of this stage include:

* Insight into personal and interpersonal processes

* Constructive self-change

* Significant work accomplishment

IMPLICATIONS FOR GROUP MEMBERSHIP

Because the form, storm and norm stages result in minimum output, it is tempting to try to rush through or short circuit these stages. Although tempting, this idea is dysfunctional. Just as individuals go through predictable stages of growth depending on age, experience, maturity and other factors, teams go through predictable stages the duration of which depends on factors such as individual and team maturity, task complexity, leadership, organizational climate and external climate. Groups can fixate at various stages. Some groups (like some people) are never fully functioning.

Given that the stages are inevitable, one way to help reduce the time needed for a new or changing team to be fully productive while minimizing the tension, fear or anxiety common in the _form_ and _storm_ stages is to share rumors, concern and expectations about the group. Members of the team can contract with one another so that there will be no "surprises", and therefore an atmosphere of trust can be achieved earlier (_norm stage_). This allows for interpersonal issues to be put aside in favor of task issues and for the team to move on to _perform_.

STAGES OF GROUP DEVELOPMENT:

BEHAVIORS, ISSUES AND QUESTIONS

STAGES	BEHAVIORS	EXPECTANCY	ISSUES	QUESTION	T/P
I Forming (Indivi-dual)	Identifying the task. Defining ground rules. Social relating. Advice giving. Evaluating self and others.	Wide range; extreme variance among group members; very insecure and idealistic.	Acceptance and dependency: - Identify in the work group - Testing	Who am I in this group?	Low TASK Low Process
II Storming (Collection of individuals)	Conflict and hostility (overt or covert). Dominance by a few. Attacking the leader.	Very low, with little variance.	Communication and goal alignment: - Intergroup conflict - Goals and objectives clarification	Who am I with others in this group?	Low Task High Process
III Norming (Group)	Increased tolerance of others. Development of harmony. Conflict avoided. Increased mutual support. Increased trust. Increased communication. Development of cohesion.	Very high with little variance; euphoric.	Assignment and group cohesion: - Describing action steps to accomplish goals and objectives - Interdependency and consensual validation	How and what are we going to do?	Med + TASK High Process
IV Performing (Team)	Effective problem solving with creativity. Emergence of solutions, insights and collaboration. Understanding of personal and interpersonal processes. Constructive self-changes occur.	High, stable, and realistic.	Monitoring and intervention: - Adoption of functional roles - Effectiveness, efficiency & creativity.	How do we accomplish and maintain effectiveness & efficiency? fluctuates w/ groups NEEDS	High Task * Low Process or High process

ICEBREAKERS

WHAT ARE ICEBREAKERS?

Icebreakers are activities used by Team Leaders to focus the energy and attention of team members in meetings or trainings.

WHEN DO WE USE THEM?

We use icebreakers whenever the Team Leader feels they would be useful, such as after new team formation, after a particularly difficult meeting or when the group needs to renew its energy.

WHY DO WE USE THEM?

Icebreakers are useful ways to:

- introduce people to one another

- break down interpersonal barriers between people

- focus the attention of team members on a common task

- provide a common experience as a base for learning

HOW DO WE USE THEM?

Since icebreakers take many different forms, the procedures for use will depend on the specific icebreaker being used
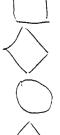
ICEBREAKER - EXAMPLES

Personality Types

OBJECTIVE: To encourage participants to relax; to introduce the concept that people differ in important ways.

PROCEDURE: Distribute (or display) a copy of the four geometric shapes shown on the following page. Direct each participant to select the one that best represents his/her personality. Ask for a show of hands to determine how many selected 1, 2, 3, and 4. Then proceed (with great seriousness) to suggest that extensive research has shown the following characteristics to be associated with each shape:

1. This person is intellectual, objective, rational, and a good decision-maker.

2. This person is steady, dependable, conservative, and has perseverance.

3. This person is dissatisfied with the status quo, believes in no-nonsense behavior, and tends to be a risk-taker.

4. This person is strongly preoccupied with sex. (This interpretation will invariably evoke a solid round of laughter.)

DISCUSSION
QUESTIONS:

1. In what ways are people really different?

2. Is it possible to categorize people by such a "test"?

3. What are the dangers of stereotyping people?

MATERIALS
REQUIRED: A handout, transparency, or flip chart.

APPROXIMATE
TIME
REQUIRED: Five minutes.

SOURCE: Unknown.

Each block represents a saying or well-known phrase. Please write your answers on the back of the page.

1	2	3	4
POCHICKENT POCHICKENT POCHICKENT POCHICKENT	ECAP PACE	GUN, JR.	PARKED/PARKED
5	6	7	8
CHECK CHECK CHECK	HEAVENS - PENNIES	COUNTRY COUNTRY	C R ☺ WD
9	10	11	12
DANCER	FISHING c	A B E DUMR	TAKE 1 MEAL TAKE 1 MEAL TAKE 1 MEAL TAKE 1 MEAL
13	14	15	16
V I O L E T s	K ( ) A I)	PEP PEP PEP PEP PEP PEP PEP PEP PEP PEP PEP PEP PEP PEP PEP PEP PEP PEP PEP	agb

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ANSWERS:

1. A chicken in every pot
2. Pace back and forth
3. Son of a gun
4. Doubleparked
5. Check and double-check
6. Pennies from heaven
7. Cross country
8. A face in a crowd
9. Topless dancer
10. Deep sea fishing
11. Bermuda Triangle
12. Take one before every meal
13. Shrinking violets
14. Middle of the road
15. Full of pep
16. A mixed bag

DIRECTIONS: -- Each block represents a saying or well-known phrase.
Please write your answers on the back of the page.

1	2	3	4 SHAPE
NIGHT FLY	HE'S/HIMSELF	r o ra̅il d	OR SHIP
5 TROUBLE T T R R O I'M O U U B B L L E TROUBLE E	6 Y FIREWORKS	7 L D BRIDGE	8 F I D D L E R
9 K PAC⊠	10 DANC T E S C ETNO	11 LO OSE	12 MAN BOARD
13 SOUP	14 WEAR LONG	15 R/E/A/D/I/N/G	16 LE VEL

ANSWERS:

1. Fly by night
2. He's beside himself
3. Railroad crossing
4. Shape up or ship out
5. I'm surrounded by trouble
6. Fourth of July fireworks
7. London Bridge
8. Fiddler on the Roof
9. Change of pace
10. Square dance contest
11. Loose at both ends
12. Man overboard
13. Split pea soup
14. Long underwear
15. Reading between the lines
16. Split level